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Identifying the unique characteristics of independent fashion retailers in Scotland by utilising Porter's generic competitive strategy model and the marketing mix

Identificar las características únicas de los minoristas independientes de moda en Escocia utilizando el modelo de estrategia competitiva genérica de Porter y el mix de marketing

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Abstract

Independent retailers in the fashion sector make a substantial contribution to the UK economy at the time of significant change on the high street due to financial pressures and the growth of online trade. They provide an element of creativity and innovation to a homogenous retail landscape. The independent fashion retailer creates a destination and individual identity by presenting a unique offering and differentiated experience. Whilst independent retailers are important to the future of our high street, research is limited, particularly in the area of fashion independents.

Therefore this research examines and identifies the unique characteristics of independent fashion retailers within Scotland. The research adopts a case study approach, qualitative methods of data collection in order to fulfil the aim and objectives of the study. Porter's Generic Competitive Strategies and the marketing mix were utilised as a means of drawing out the individual aspects and unique characteristics of the independent fashion retailer.

Keywords

Independent fashion retail, marketing mix, niche strategy,

Resumen

Los minoristas independientes en el sector de la moda hacen una contribución sustancial a la economía del Reino Unido en el momento de un cambio significativo en la calle debido a las presiones financieras y el crecimiento del comercio en línea. Proporcionan un elemento de creatividad e innovación a un paisaje minorista homogéneo. El distribuidor independiente de moda crea un destino y una identidad individual al presentar una oferta única y una experiencia diferenciada. Mientras que los minoristas independientes son importantes para el futuro de nuestra calle, la investigación es limitada, sobre todo en el área de independientes de la moda.

Por lo tanto, esta investigación examina e identifica las características únicas de los minoristas independientes de moda en Escocia. La investigación adopta un enfoque de estudio de caso, métodos cualitativos de recolección de datos con el fin de cumplir con el objetivo y los objetivos del estudio. Las Estrategias Competitivas Generales de Porter y la mezcla de mercadeo se utilizaron como un medio de extraer los aspectos individuales y las características únicas del minorista de moda independiente.

Palabras clave

Venta al por menor independiente de la manera, mezcla de la comercialización, estrategia del lugar,

1 Introduction

Fashion is a dynamic ever-changing environment (Tungate, 2012). Society today offers more opportunities for diversity in fashion retailing than ever before with the rise of e-commerce and multi channel retailing (Portas 2011). Consumers have become more sophisticated and market savvy, demanding more choice and competitive offerings (Drapers, 2016). The changes in today's retail landscape have driven multiple retailers to rethink their retail estates allowing the opportunity independent retailers to prosper on the high street in secondary locations. (Clarke, Denson & Perry 2011).

Fashion independent retailers have a unique positioning, which provides an eclectic mix of fashion brands brought together to create a wardrobe building experience for its customers (Donnell, Hutchinson & Reid, 2012). The independent fashion retailer creates a destination and individual identity by evoking an atmosphere of creativity. Tungate (2012) suggests that small-curated stores selling unusual, multiple brands, along with other lifestyle accoutrements, will become more common due to customers seeking variety and individuality. The independent retail environment in the U.K and across Europe, however is undergoing significant changes and difficulties due to financial pressures and the growth of online trade. The study therefore, focuses on independent fashion retailers and explores their contribution to fashion retailing in Scotland.

Independent retailers in the fashion sector make a significant contribution to the UK economy; they are numerically dominant, providing a range of functions and roles in varied locations throughout the UK (Donnell, Hutchinson & Reid 2012). The fashion industry made a £26 billion direct contribution to the UK economy GDP in 2015 (The British Fashion Council, 2016) and £12.4 billion was spent on online fashion purchases in the UK in 2015, up 16% from £10.7 billion in 2014 (Mintel, 2015), with independent retailers account for 65% of all retail and leisure units in the UK (British Independent Retailers Association, 2016). Intensified competition in the marketplace has led to closures of a significant number of small independent fashion retailers since the recession began in 2009 (Guardian, 2012), however, in contrast the British Independent Retailers Association (2016) reports that traditional independent stores opened more shops than were closed in 2016 across the U.K, whilst the national chains continued to see a fall. In this time of unprecedented retail change and turbulence, when customers are constantly adapting their consumer behaviour, customers needs and wants have become a matter of demand (Sands, Ferraro 2010). Grewal 2014 states *"the key to retailing is understanding one's customer"*. Successful retailers today need to understand the increasing diversity in consumer tastes and customer requirements as a matter of survival (Donnell, Hutchison & Reid, 2012). Independent retailers who can better tailor their offering to this fragmented market seem to be in a more favourable position in the market today (Dalgic and Leeuw 2006). Alan Hawkins, CEO, British Independent Retailers Association (BIRA) said

"It's encouraging to see a growing vigor in independent retailers across the UK. It's becoming increasingly clear that the customer both needs and wants to be present when shopping for some items, as well as having online options, and that this will hopefully have a positive impact on independent shops" (BIRA 2016).

Across the UK where fashion minded customers are present, small independent businesses have opened to serve their needs (Diamond 2015). Even in today's uncertain climate, retailing remains dominated by independent retailers who are typically owner managed, family or entrepreneurial organisations (Donnell et.al, 2012). Fashion independents tend to be single or small-scale businesses, which cater for a relatively small but affluent share of the market (Stokes & Wilson, 2006). Innovation of new product, services and identifying market trends are key factors in the success or failure of small independent businesses (Cummins, 2008). The process of developing and sustaining an Independent retail business relies on the creativity of those individuals involved and their ability to produce original ideas for new products or services. Stokes & Wilson (2006) consider innovation as a key driver in the competitiveness and productivity of a small business. The terms innovation and creativity are often placed in the context of the Independent retailer:

Creativity is the generation of ideas. Innovation is the successful exploitation of new ideas and the introduction of change (Gilmore & Carson 2009 Pg.104).

The innovative Independent retailer is one that is *"alive to change and flexible in its approach"* with dynamic capabilities (Quinn et.al, 2013). Consequently fashion independents tend to innovate and differentiate themselves from other retailers in the sector by offering a collection of higher priced items in smaller quantities which provide their customers with a sense of exclusivity (Frings 2008, Diamond, 2015). Owner/managers strive to present a different product offering from their competitors, alongside custom designed or unique, key pieces (Diamond, 2006). Their strength is personalized service, with trained staff focusing on building customer relationships and offering individual styling direction (Hristov & Reynolds 2015). Conversely, Goworek & McGoldrick (2015) believe it is more difficult for small independents to gain economies of scale in terms of product, management and expertise, achieved by large chains. One of the most common reasons for the failure of independent retailers is that a viable market is not identified, with

insufficient customers for the product offering. Often owner/managers fail to recognise the value of marketing activity and tend to use basic methods (O'Dwyer et.al, 2009). In contrast successful independents continuously alter the marketing mix, adapt marketing activity and look for a niche where their strength's will be most value (Cummins et.al, 2002). Storey (1994) suggests that innovation and the identification of a particular Niche were key strategies influencing growth of small business. The changes in today's retail landscape have driven multiples retailers to rethink their retail estates providing an opportunity for independent retailers to prosper (Clarke et.al 2011). The British Government commissioned the Portas Review (2011), an Independent Review into the future of the high street led by the Retail expert Mary Portas. The review states that specialist retailers know how to express and manifest their expertise across everything they do. Portas (2016) herself suggested: "*The thing about Independent retail today is that you need to create a destination in order to generate the footfall. It is about the 'why' as opposed to the 'what'. You have to question yourself, what makes your shop unique to the customer* (Portas 2011 pg. 15). Thus, small independent fashion retailers may be able to achieve a niche competitive advantage by means of a differentiated service-scape or unique customer experience (Clarke et.al 2011). Porter's three generic strategies provide "*a good starting point for strategic thinking*". Porter (1985) defines competitive strategy as the search for a favourable competitive position within an industry. Competitive strategy aims to establish a profitable and sustainable strategy against industry competitors (Porter, 1983). Within his Generic Competitive Strategies, Porter establishes three main strategy routes as cost leadership, differentiation and focus, (see Figure 1). The cost leadership and differentiation strategies seek competitive advantage in a broad range of industry segments in contrast to focus, which aims at cost advantage or differentiation within a narrow market segment (Porter 1990)

| | | COMPETITIVE ADVANTAGE | |
|-------------------|---------------|-----------------------|---------------------------------------|
| | | Lower Cost | Differentiation |
| COMPETITIVE SCOPE | Broad target | 1. Cost Leadership | 2. Differentiation The Company |
| | Narrow target | 3A. Cost Focus | 3B. Differentiation Focus |

Source: Porter (1985)

Fig 1: Porter's Generic Competitive Strategies Model

The first of Porter's three main strategy routes is overall cost leadership; low cost in comparison to competitors is the key to the entire strategy (Montgomery & Porter, 1991). Cost leadership requires aggressive pursuit of cost reductions as well as tight control of business costs, without denying overall quality or service to the customer (Porter, 1983). Businesses that follow this strategy work hard to keep prices lower than their competitors but also gain a larger market share (Porter, 1991). Those pursuing this strategy tend to be manufacturers or physical distributors who can keep a closer control of cost (Porter 1985). The difficulty with overall cost leadership is that businesses will always be striving to lower costs and undercut competitors (Kotler & Keller, 2006).

The second generic strategy differentiation sees the business achieving superior performance through offering a product or service that is viewed as unique within the market place (Sumner & Gilbert, 2004). Differentiation approaches may include a business's brand image, their unique use of technology or overall customer service (Porter 1985). Porter (2004) suggests that competitive advantage is gained when a retailer has differentiated itself from its surrounding competitors. A positive balance between the store's image, product offering and the perception of the customer's self image needs to be achieved and the business must offer something special or unique (Frings, 2007). Brand loyalty is built when customers believe they receive an individual experience, thus resulting in lower price sensitivity and allowing the retailer to increase margins. A perception of exclusivity maybe created through differentiation, providing quality, well designed

product at higher prices (Frings, 2007; Diamond, 2006), however, whilst customers acknowledge the retailers superior offering they may not be willing or able to pay for the higher valued product (Porter, 1983).

The final strategy, focus strategy rests on the choice of a narrow competitive scope within an industry (Porter 1983, Kotler & Keller 2015). It selects a segment group, product or geographic, which to tailor its strategy to and only serves their needs. Porter (1985) believes competitive advantage can be achieved when a business dedicates itself solely to the chosen segment. Two variants exist within focus strategy; the target segment must have buyers with unusual needs or offer a service that differs from competitors (Porter 1983). Within this narrow market Porter (2004) suggests that the business must understand its market thoroughly and pursue elements of both cost leadership and differentiation strategies.

A focus strategy is normally one of specialisation; the term refers to businesses that operate in a niche market, such as specialist fashion boutiques (Porter 1985, Easey 2006). These retailers are attempting to offer a unique product whilst anticipating and focusing on the needs of their customer (Toften & Hammervoll, 2013). Furthermore Kotler (2012) claims focus or niche Marketers are

"hidden champions who tend to be dedicated to their customer, offer superior performance, responsive service as well as customer intimacy" pg214.

In addition, it maybe the business achieves success through these attributes but also through geographical positioning (Easey, 2009). In spite of that the risk of a focus strategy is that the business may only limit itself to a product or service that goes out of fashion then finds it is too difficult to diversify (Jackson & Shaw, 2009). If the chosen target segment is not different from other areas, then the focus strategy will not succeed (Porter, 1983, Kotler & Keller, 2015).

Niche marketing or focus strategy concentrates on specialisation within a limited market and is often viewed as a superior strategy for small businesses (Toften & Hammervoll, 2015). Dalgic and Leeuw (1994, pg.41) describe niche marketing as a

"Creative processes of carving out a small part of the market whose needs are not fulfilled. By specialisation along market, customer, product or marketing mix lines, a company can match the unique needs".

Hence, a niche has a narrowly defined customer base, seeking distinctive products and benefits (Dalgic & Leeuw, 1994). Kotler (2006) suggests an attractive niche is created when: the customer has a distinct set of needs and will pay a premium to the business, which most satisfies their needs. A successful independent retail approach will be based upon offering superior value and quality to customers (Toften & Hammervoll, 2015). Superior quality is achieved through the retailer knowing the exact requirements of the customer better than their competitors and tailoring its resources to meet that need (Doyle & Stern 2006). Therefore a niche approach should also cultivate a strong culture and vision (Kotler, 2003).

Hence, the independent fashion retailer should be a trend-setting/trend spotter; product and market innovators and true niche based businesses should recognize the importance of sound research (Weinstein, 1994). To stand the test of time and remain sustainable Stanton and Linneman (2009) suggest a niche business must know themselves by identifying the company's strengths and weaknesses, its uniqueness, distinctive competences and regional characteristics. They also highlight the importance of being competitor orientated, responsive to the market and ever evolving to capture customer's attention in pursuit of long-term relationships. Additionally, Dalgic (2006) believes long term, strong customer relationships are key to a niche marketer's success. It is essential that owner/managers are continuously innovating and have direct and regular contact with key customers. Conversely, it is difficult for independent retailers to gain competitive advantage against larger competitors particularly on the basis of price or differentiation; competitive advantage can be gained through such factors as product quality, customer service philosophy, physical evidence, the owner's personality or the store ambiance, which combined provide differentiation in a niche context (Clarke et.al 2011). Yet Niches can weaken, thus the business has three tasks: creating new niches, expanding niches and protecting niches (Kotler, 2012). Toften & Hammervoll (2015) suggest that by developing strengths in one or more niches a company has more opportunity for sustainability and survival.

Balasescu (2014) suggests that the retail marketing mix is a range of controllable variables that the fashion marketer can manipulate to meet the needs of the consumer and gain profitability.

"It is getting the right product to the chosen segment at the correct time, in the right place and for the right price" (Easey 2009 p.105).

Thus the fashion independents main aim is to create a distinct retail image co-ordinating the various elements of the marketing mix towards the positioning objective and most importantly the consumer (Kent &

Omar, 2003). Successful owner managers will determine the optimal mix for their own market place; an appropriate marketing mix facilitates the creation of a retail personality (Diamond, 2006)

Today the modern fashion consumer is more knowledgeable, sophisticated and discerning in their choice of product, they are more selective consumers who desire and demand different product (Jackson & Shaw, 2009). However, as multi chain retailers and super-markets continue to churn out fast fashion the fashion savvy, environmentally aware customer is turning to small shops to satisfy their need for individuality through product (Dawson, Findlay & Sparks 2008). With Spellman (2011) recognising that unsatisfied customers and products that are too samey provides an opportunity for growth and competitive advantage (Spellman 2011).

McGregor (2013) suggests that independent fashion retailers should have range coherency by offering a narrower, deeper product range that has been specifically selected. The width and depth of the offering is also influenced by the finance, current stock holding and floor-space of the retail business (McGuinness & Hutchinson, 2013). Product selection is affected by sales history, previous sell through, emerging trends of the season, pricing and competitor analysis of product offering (Kent & Omar, 2003). As such, Gilbert (2004) identifies that volatility exists within product selection because of the speed of change in fashion. Therefore, independent fashion retailers need to take a creative approach and require an in-depth knowledge of their market and their customer's requirements when selecting product (Easey 2009, Jackson & Shaw 2009). In contrast, if the fashion product is fundamentally wrong, no level of discounting or promotion will make it sell (Jackson & Shaw 2009). Hence, independent fashion retailers have a unique offering that provides an eclectic mix of fashion brands brought together to create a wardrobe building experience for its customers (Tungate, 2012). Furthermore, the owner/manager must carefully plan the ranges, taking into consideration key trends and how the product mix will work as a whole story on the shop-floor (Easey 2009). Getting the product right is vital to an independent fashion retailer's success. Niche retailers can gain a degree of exclusivity of brand through early decision-making; often-designer brands are willing to confine specific collections to retailers within regional trading areas (Diamond 2006). This approach allows a varied product mix and price range (Frings, 2008, Diamond, 2006).

The fashion retailer uses pricing as a strategic tool, which is seen to be the most tactical, but easily alterable element of the marketing mix (Easey 2009). Gilbert (2004) however, believes good pricing decisions are the hardest to make, in comparison to other elements of the marketing mix. Nonetheless, it is difficult for a retailer to apply a formulaic approach to pricing strategy as experience of the market is one of the key factors in decision making (Easey 2009). Pricing decisions provide retailers the opportunity to achieve growth, optimise sales revenue and maximise profit margins (McGuinness & Hutchinson 2011). Furthermore, pricing also assists in reflecting brand positioning and provides value to customers, who may not be driven solely by price but instead may rely on the retailer's reputation (Balasescu 2014). Jackson & Shaw (2009) suggests that profit margin differs from product to product; lower margin will be accepted on fast selling and high volume product, whereas high margin is expected on higher priced, trend led products, which do not sell as quickly. Gilbert (2003) further indicates that retailers will buy a product at cost price and apply a mark-up, which is driven by general overheads but also the pricing strategy used by competitors or the mark-up defined by a brand. A higher price may suggest that the product is of a superior quality, with designer fashion brands often holding higher price points and profit margins to support the high overhead costs of the retail store (Gilbert, 2003; Easey, 2009). In addition, high end products require larger end of season discounts due to the trend led nature of these pieces, which can be affected by the exchange rate and can alter the products cost price (Easey 2006). However Fashion retailing can be seen to be the most risky form of retailing due to the trend led nature of the product, varying consumer buying behaviour and altering weather patterns which all affect profit yield. McCormick et.al. (2014) claims retail pricing in the future will become more complex and the management of fashion pricing will be increasingly fast moving, due to the affect of the internet and social media. Gilbert et. Al. (2004), proposes that retail pricing policy has to respond to market changes, offering price transparency as the customer is now better equipped to make an instant comparison to competitors as well as acquiring value for money.

Gilbert (2003) suggests destination retailing is linked to speciality stores who possess unique characteristics that attract a specific target group. Independent fashion retailers create a destination, as they frequently know their customers personally (Porter 1985). They create strong relationships by talking directly to customers, individually profiling and identifying individual needs whilst providing a one to one service (Dalgic & Leeuw, 1994). Easey (2006) identifies that fashion retailing is the means by which clothes reach the customer. The location in which a retailer chooses to operate will appeal to the type and number of customers they wish to attract, as well as creating a physical facade of the businesses characteristics (Kent & Omar 2004). A fashion brand may choose multi distribution channels that most commonly is either a retail outlet or by way of ecommerce (Diamond 2006). A store has specific stock onsite where customers can make an instant purchase, whereas the ecommerce operation requires the goods to be delivered to the

consumer (Jackson & Shaw 2009). However, the old adage "Location, location, location" is often the most important consideration of any retailer setting up a new store (Diamond 2006; Freathy 2003). With a good location optimising sales and profit, as well as gaining competitive advantage (Kent & Omar, 2004). Selecting a suitable location requires analysis of the retailers marketing strategy and a full understanding of the target market (Donnell, Hutchinson & Reid, 2012). The retailer should consider customer demographics, the recent social structural changes within the chosen town/city and complete a site evaluation, which considers traffic flow, accessibility, compatibility to store concept and government policy/council fees (Sumner & Gilbert, 2004). Other issues to be considered when targeting a location are retail structure; the number of competitors surrounding, the similarity to other stores and the site characteristics; available car park and visibility of the store itself (Jackson & Shaw, 2009). However, there is huge financial risk in developing a store concept, the wrong location and store failure can have significant impact on the retailer's image, threatening the long term growth of the company (Gilbert, 2004). Critically, in recent years, fashion independents have been lagging behind multiple retailers due to economies of scale, with many succumbing to high rental demands (Donnell, Hutchinson & Reid, 2012). Yet, as stated earlier, the British government commissioned the Portas Review (2011), an independent review into the future of the high street, that highlighted the importance of the existence of stand alone, independent retailers in the U.K. Hence, independent fashion retailers create a destination which, possess unique characteristics that attract a specific target group.

In today's diverse fashion market, niche retailers continue to rely on editorial and word of mouth to establish a reputation (Hutter & Hoffmann, 2014). Online activity and social networking allow customers the opportunity to keep up to date with core product offering and in-store events (Draper, 2016). The fashion independent retailer today is striving to capture their brand identity not only in-store but also online too (McGregor, 2013). Both aspects of the distribution channel need to capture the brand atmosphere and deliver the required customer experience (Easey 2009). Independent fashion retailers need to invest in new innovative marketing strategies in-store (Birtwistle 1998) and online via multi channel activities where market entry costs are low. Lewis Twedell, owner of premium fashion independent Lewis Yates believes "Most retailers now recognise the power of ecommerce and marketing" (Draper June 2013 p.10) it is not sustainable in this marketplace today not to have some form of online presence. Essentially as mentioned before, customers are market savvy and can quickly make a product and price comparisons online (Drapers 2015). Consequently, retailers must use every appropriate means of informing potential customers about their product offerings. Omar (2004) believes promotion is the activity of informing, persuading and reminding customers through advertising, personal selling, sales promotion and online activity.

Independent fashion retailers establish a defined brand identity through store image (Tungate 2005), interesting visual merchandising, where product sit together to create seasonal trends or a wardrobe building experience, which can assist in delivering brand identity. Hines and Bruce (2007) also identify increased market share can be gained by creating strong store image and brand identity. The image can be described as the overall look of a store and the series of mental pictures it evokes (Donnell & Hutchinson et.al 2012). For the retailer developing a powerful brand identity provides the opportunity to stand out from the competition and be remembered (Jackson & Shaw 2009). Hence, Britten (2006) proposes there must be a common thread that runs from the brand's DNA right through to the environment. Independent fashion retailers shape their stores around an attitude or lifestyle; they cater specifically for the unique characteristics of their customer (Ballantine, et.al, 2015). By capitalising on the "whole experience" consumers look beyond mere purchase and consumption to the unique and rewarding (Kim 2009) and in doing so independent fashion retailers create a differentiated experience, which encourages customers to dwell and consume (McGregor, 2013).

Whilst the future of our high street is uncertain, as, there is a sense of optimism amongst established independent fashion retailers, as retail figures for the future, forecast growth in this market place (British Independent Retail Society, 2016). Small independent fashion retailers are seeking secondary locations away from the high street (Donnell et.al, 2012).

2 Methodology

This research employed a phenomenological approach in which qualitative research was a key method. Qualitative research is a combination of rational, explorative and intuitive skills, where the experiences of the researcher play an important role in the analysis of data (Ghauri & Gronhaug 2005). As the research is explorative in nature seeking to examine the "how" and "why" questions in relation to independent fashion retail it is appropriate to use qualitative research methods. Also the opinions and views of the respondents who are owner/managers of the chosen fashion independents are crucial to the research.

A case study is an extensive investigation of a single instance of phenomenon; this method of enquiry is particularly useful when the focus is on current phenomenon in a real life context (Yin 2003, Ghauri & Gronhaug 2005, Collis & Hussey 2014). As a research strategy the case study approach relates to descriptive or exploratory research, it is used in many situations to gain a deeper understanding of individual, group, and organizational, social or political related phenomena. The case study allows researchers to "*retain the holistic and meaningful characteristics of real life events; organisational and managerial processes*" (Yin 2003 pg 2). This strategy generally adopts various primary data collection methods; such as verbal reports, personal interviews and observations. Secondary data may also be incorporated which may include financial reports, market and competition reports (Yin 2003). The research included observation and interview techniques combined with existing data. Case study research may assume a single-case or multi-case design (Ghauri & Gronhaug 2005). A single case study is appropriate when a case maybe critical or unique. As indicated above single case studies allow researchers to investigate phenomena in-depth to provide rich investigation and understanding (Broadbent, Darke, Shanks, 2002). Whereas multiple case or comparative case studies maybe preferable as they provide the opportunity to compare and analyse data from various, diverse settings (Ghauri & Gronhaug 2005). Yin (2003) suggests that the evidence generated from multiple cases can be viewed as "more compelling" allowing for a more robust study. Cross case analysis assists in identifying the similarities and differences whilst identifying common patterns between cases (Collis & Hussey 2014).

With this in mind a multi-case study strategy was selected for this research, which investigates the application of Porters Generic Strategy and the marketing mix to each independent fashion retailer's business strategy, identify their unique characteristics.

Unstructured or indepth interviews were used to investigate the specific area of interest (Saunders 2009). Privileged information was provided from key players from the independent fashion retail industry who offer an insight into a valued situation (Denscombe 1998). Interviews focus on the interviewee's thoughts, thus a structured list of questions is not relevant in this case. A semi structured style of interview was employed with the researcher having a clear list of issues to be addressed and questions to be answered. A list of questions were formed utilising Porter's Competitive Strategy model and the individual elements of the marketing mix. The questions were piloted before the initial interviews took place. Jankowicz (2000) suggests that pilot work allows the researcher to decide whether the content of the data collection method is appropriate. In this case an industry expert who had many years of fashion retail experience reviewed the intended questions. Subsequently, a meeting with the industry expert took place, with several suggestions of additional questions being addressed. The additional relevant questions were added to the final interview structure.

The fashion independents were chosen due to their established brand identity, created by their unique choice of interiors, label profiles and selling style. The five retailers are in different regional locations across Scotland and were accessible for this research. Additionally, they were owner/managers within the five Independent Fashion retailers identified in the Drapers Inspiring Independents 2015. The five retailers were located across Scotland and were easily accessible for the researcher. The respondents were recruited by letter, email and telephone conversations, leading to initial store visits. Interviews were unstructured and took place within the store environment, all of the interviews were face to face and recorded.

Store observation, also took place in all of the fashion independents. Observation can be described as a means for the researcher to immerse themselves in a research setting(Mason, J 1996). It allows the researcher to be "socially invisible" and where possible to observe without participation (Denscombe, M ,1998). Yin (2003) believes making field visits to the case study site allows the researcher to capture direct observation and can be formal or casual data collection activities. A casual observational approach was taken during store visits, where the researcher focused on the interiors/window display, visual merchandising and customer service of the specific retailer identifying unique and individual characteristics. The opportunity to shadow a member of staff or participation instore was provided by three of the five retailers.

3 Findings and Discussion

The research identified the owner's motivation to provide a unique or differentiated experience as a key driver to establishing a fashion independent retail store, with them striving to provide a different shopping experience:-

"It was the late 70's and early 80's – exciting times, yet most "fashion boutiques" were still in the "gentlemen's outfitters" mould, numbingly boring. I remember the main fashion store in Newcastle at the time played radio 1 in the store. I knew I could do much better by creating a very different shopping experience and one that reflected the times". (Retailer A)

"After buying over a business we felt we had never really started our own business, we wanted to do something from scratch. From our experiences and mistakes we decided we wanted to offer something different so opened our independent". (Retailer B)

The research revealed creativity and innovation were key components to the retailer's initial concepts. Retailer C explained that it was her mother's creativity and determination to do something unusual that created the individual store concept:-

"She founded the store in 1969; the kind of ethos behind it was to be a French style boutique in look but selling only British Brands". (Retailer C).

Creativity and innovation were key to the initial stages of Retailer D's independent fashion lifestyle concept. The owner explained that he has always been drawn to good quality, well-designed clothing, providing the inspiration for the interior and concept of the store, which were created around the aesthetic of the product. Retailer D proposed that the combination of personal interests and creativity were the foundation for the store concept. The combined interest of well crafted, quality, individual product sparked the decision to establish a small independent fashion retailer in 2012 in spite of the difficult retail marketplace: -

"The product we offer is not readily available in Scotland or even Edinburgh" (Retailer D).

Competitive advantage therefore can be gained through differentiation, when a retailer offers a product or service that is viewed as unique in the marketplace. The retailers all indicated that they sought forms of differentiation as an initial motivation behind establishing a Fashion Independent store.

3.1 Product Mix

The research revealed product was viewed by all the retailers as indicative to their success as fashion retailers. Each retailer had differing approaches to their product mix but all had their customer in mind when selecting product for their store.

Retailer B's product mix is based on a number of factors; target customers that varies widely in age range and price. As a street wear retailer the product appeals to a wide target group, with a customer age range of 18-50 years. To satisfy customer tastes, Retailer B has three main product focuses; the "carbon kid", the "older guy" and the "sneaker head". The "carbon kid" is the young customer seeking mid priced, branded street-wear that will visit the store to make weekend purchases. Retailer B describes his older customer:-

"We have an older customer who comes in Monday to Friday, office workers, architects, lawyers- who are into Loake, Edwin jeans. That fashion changes so slowly, dark denim, pair of brogues and a shirt, a jacket that doesn't change from season to season. We have a 40 year old guy who wants the same Carhartt jacket he had two years ago, just in a different colour"

Retailer B describes the "sneaker head" as the customer who is looking for limited edition, one off footwear that currently accounts for half of the businesses turnover.

During the store observation it was obvious that Retailer B had created clearly defined product categories in-store to satisfy customer requirements. Product is presented in zones with high priced traditional street-wear product to the left of the store and lower priced product and footwear to the centre and left of the store.

Furthermore Retailer C creates a top 100 spenders list which is broken down into customer's sizes and ages. These top 100 customers provide a third of Retailer C's turnover *"so they are the hundred women I nurture"* to an extent product selection is reliant on their requirements.

In contrast the research identified that Retailer D focuses on the design aspect of the product; it is a collection of quality basics, which maybe a hand knitted sweater which has a particular detail or style of knit, a well cut pair of jeans or a classic outwear from the label Golden Bear. Retailer D believes:-

"The story behind the product is almost as important as the product itself and is very much part of their customer experience, talking to the makers of the footwear who describe the 250 different operations used when making the shoes all provide the attraction of the product"

After over twenty years as an independent fashion Retailer A believes today's customer to be more sophisticated and discerning: -

"Our customers increasingly had an appetite and knowledge of fashion. Customers were more and more aspirational. Commercially we needed to appeal across different income levels, tastes and eventually generations".

From a buying perspective Retailer A continues: -

"I always felt and still do, that in a sense you either "have it or you don't". What was important was to buy great fashion product at perceived value (regardless of price) and that IT WOULD SELL as the main criteria. The depth of buy would always reflect the saleability. When one stuck one's neck out it was always in a measured way.

Most failed independents would either have overly enlarged egos, poor commercial sense and awareness, or the inability to change and evolve".

Today the modern fashion consumer is more knowledgeable, sophisticated and discerning in their choice of product. They are more selective consumers who desire and demand different product.

The research demonstrated that the retailers take a varied approach to seasonal trends. Retailers B and D, who as Menswear Independents were less driven by trends more by the quality and cut of the product. Retailer B will see at least three or four suppliers before they begin to build a picture of the trends of the season.

Retailer C identifies the importance of trends to her business:-

"Obviously we are a fashion business, so yeah they are huge, I would say I edit from the trends" she goes on to say:-

"I do obviously buy into trends but not the ones that are not appropriate for my customers age and if there is something I don't like, like velvet, I'm not sure of, it's my shop, my vision, I'm not going to buy it."

As Fashion Independents, all the retailers were reluctant to invest hugely in seasonal trends, preferring to concentrate on product, which is customer led. Instead they choose to touch on a few key looks to keep their stores current, whilst not taking huge financial risks. As suggested by Retailers D:-

"We are not trend led, however we may pick up on a colour or fabric of the season, menswear tends not to be so trend led." (Retailer D).

Similarly, Retailer C recognised the importance of seasonal trends but preferred to visit at least three or four suppliers before making any decision on trend direction.

The research highlights the importance of the introduction of new, innovative labels by each retailer as a means of focus or differentiation. As suggested by Retailer A:-

"Our independent is a fashion based company even still and the above are imperative. Success comes with a commercial balance between proven product and innovation".

Retailers B aims to introduce new brands each season:-

"Yeah we have picked up a new brand called Gilded Labour, two guys who do design stuff in London, Universal works is new for this season, Lacoste Live – this year we have four new brands, for next spring we have two new brands. We try to do two new brands a season". (Retailer B)

Additionally Retailers C and D state that limited edition or one offs were important to their product mix. The existing brand relationships built by Retailer C allows the opportunity to order additional sizes or limited colours specifically for customer. Retailer D agrees:-

"We have product that is specifically manufactured for us, one off, hand knits from Harley of Scotland, limited edition pieces".

The research identifies the importance of product exclusivity to the high fashion independents, Retailers A and C. Retailers A describes his initial experience of seeking exclusivity:-

"When I started out in retail, I faced all the problems of distribution and supply from the existing retailers. The "in-brands" were by and large different, but brands were often exclusive to existing customers, who fought tooth and nail to keep you out. In the face of that, I had to work a lot harder and look a lot further afield and be completely product driven, which was far more challenging, but not too difficult having been a maker myself, I felt I had a nose for product".

They further explained, the extensive experience of buying designer product, which relies on exclusivity, has led them to believe: -

"You try for exclusivity for two different reasons: to make great profit from a brand or to reduce the risk of not selling because the product might not be so commercial"

Retailer C relies on exclusivity of product to cater for the exclusive requirements of a high spending customer, who attends select social events:-

"Exclusivity is important in terms of the social scene in Scotland, which is small and the really big events, you can't have too many Roksanda Ilincic neon gowns, I need to know that I have bought a 10 and a 12 and one is going to Aberdeen and the other is going to Edinburgh to host a ball. I need to know those dresses are apart. When a dress is £1200 you can't afford to, you lose a customer for life if you make that mistake and the dresses clash".

They continued, this is the reason exclusivity is important:-

"So there is a reason, it's not that I am being selfish and want exclusivity, I need to track where the gowns I am selling are going, we have a book of certain events, key weddings, social events, we have a book of who's wearing what"

In contrast Retailers B deem themselves as being too small to expect exclusivity of brand, instead they are happy to share with another key retailer in their town.

3.2 Price

The research identifies a similar strategic approach to price applied by all the independent fashion retailers; they are not formulaic in their approach, but believe that price is not a main driver of their business. Instead

they aim to offer quality product that identifies with customer aspiration. Retailer A highlights this in his statement:-

"I think essentially that we tried to reflect the fashion aspirations of our customers by offering a spectrum of price points from work to leisure wear. Being aware that whatever price level the customer was comfortable with, the likelihood would be that they might aspire to more".

Retailer C supports this point by asserting:-

"No I don't think at the level we are at that price is a driver, if it's the right thing and it ticks all the boxes then within reason price is irrelevant".

While Retailer D also agrees that their product is not price driven and ranges from £100 to £300, but they believe their products are investment pieces that will be kept and worn over and over again. Similarly Retailer B has a wide ranging price strategy which attracts a varied customer base with entry customer prices starting from £50 to higher value pieces over £200. They suggests:-

"The average spend is about £60, we don't really have a customer that comes in and spends hundreds of pounds. We get guys coming in and buying a t-shirt and a pair of jeans and then you see them next week, see them every week, not one off customers"

Additionally, Retailer B tends to offer a discount to high profile, higher spending customers to encourage them to come into the store frequently.

Pricing decisions therefore, have provided these retailers with the opportunity to achieve growth and maximise profit margins and more importantly assisted in reflecting brand positioning and providing value to customers.

3.3 Place

The research revealed that all of the retailers identified with the need to adapt to the continuously changing environment within the Fashion industry, but more importantly to the changes affecting their own high streets. They identified the changing retail landscape has resulted in independents locating to secondary retail locations, where clusters of similar independents have begun to emerge. Furthermore, all of the retailers had an established retail outlet and a developed an ecommerce facility.

Retailer A reiterates this in his commentary about the changes in today's high street:-

"The high street is changing rapidly. The economic recession has all but wiped out the high street in smaller towns. The biggest problem for the independent is rising overheads, against very controlled profit margins- as a result of buying in from suppliers. The only retailers able to profit on the high street are the multiples with vertical margins. Independents generally have to locate to secondary areas. In that respect the more "clustering" of related independent retailers the more chance of "co-operative survival"

As newly established retailers, Retailer D and Retailer C support this statement:-

"There is a small community of shop keepers beginning to emerge in Stockbridge and they very much support one another and encourage customers into the surrounding shops" (Retailer D).

Retailer C continues:-

"The niche feel to the street, which has grown up because of us. Well it was 25years ago when mum moved here and it was all antique shops, which have fallen by the way side and a really interesting cluster of independent businesses has grown up. We benefit because we do not have the high rates to pay and a business like mine couldn't sustain those rates. Just works in lots of levels because we are near enough, George Street, so customers can do the triangle."

Retailer B had a slightly different perspective; they are also located in a secondary location but not surrounded by other Fashion Independents, however the customer who visits his store, also use the multiples close by.

The retailers considered it a benefit to be located near their main competitors and felt they could prosper in secondary locations on the high street.

The research revealed that there is huge financial risk in developing a store concept, the wrong location and store failure can have significant impact on the retailer's image. Both Retailer B and C have considered developing a second store concept but feel that growth is now in the e-commerce area of the fashion business. Retailer B maintains:-

"We would never open a second store because it is two rents, two rates, two sets of staffing cost and you split your customer between two shops. All the growth is online; we have two websites. I think the key is to have one good shop and concentrate online."

Retailer C also suggests the growth of their business is online:-

"My main problem is that I have reached the turnover I can do on this site, I can't make my shop any bigger because I can't physically get any more stock in, so turnover has been kind of static over the last few years. I wouldn't move to another location because I don't think I could translate what we do to another store. The

main thing for me is to add more on via the website and then I would predict, I might be wrong that the website would take over the bricks and mortar in terms of turnover"

Retailer A is candid in his opinion:-

"As simple as this –the internet is a big part of the future of retailing. In simple terms I don't know how retailers will survive WITHOUT the Internet and all the potential it brings, let alone grow their business.

3.4 Promotion

The research revealed that most of the retailers have significant success with their social media activity, whether it is creating a community or providing customers with new product information, both Retailer B and C are optimising their usage of Social Media. The development online does not come without its problems. Retailer B believes that their experience has been:-

"Really tricky, even in the sense of the basics. We have had the blog for 5 years and post pretty much every day. We get about 4,500 – 6,000 people visiting our blog every week because it has been going for so long, but it is getting harder. The question I ask myself is where do we advertise as a small business? How do we advertise, to get the wee" Carbon Kids"? Traditional advertising methods no longer work for us, what Size is doing is good. They found four or five guys who have 10 to 15,000 followers on Instagram and they gave them free product as a form of advertising, this is something I may have to consider".

Similarly Retailer C has created her own community through Social media:-

"We do a huge amount on social media; it's kind of all consuming. I think there is differences between the boutiques that do, do that or the ones that ignore it. We blog everyday not necessarily about items in the shop but it might be about a nail polish we like, a restaurant just opened, what is relevant to our customers that day. It's all about making the customer feel as though she is part of our community".

Retailer C has ten staff that input weekly input into the company blog. The sales team are very wide in age, ranging from 21 years to 60 years, which appeals to a varied customer base.

In contrast Retailer D, as a newly established retailer, prefers the use of word of mouth as a promotional tool: -

"We are not into social media because there are only the two of us, we don't want to be spending our day "tweeting", instead we would rather be speaking directly to our customers".

The research went on to reveal that traditional methods of promotion were also employed by all the retailers who found it invaluable in today's marketplace to hold in-store events for particular brands or occasions. Retailer B and Retailer C both used Social Media as a means of promoting events:-

"The more work and effort put into it the better it is, parties work well if you have a really strong purpose. If you are giving away discount, prizes, free stuff then you have a good video which people tweet or post on Instagram as a form of advertising". (Retailer B)

"Lots of fashion shows, monthly one's in here. We can seat fifty ladies, quite informal, two a day one in the morning, one in the evening. That is what we call a selling show, where the woman can try on the pieces after the show – that's a busy day, they are hugely successful". (Retailer C).

As mentioned previously, it is vital in today's marketplace that Independent retailers use every appropriate means of informing potential customers about their product offerings.

3.5 Store Environment

The research identified that the retailers all carried different viewpoints to store environment and visual identity, applying varying levels of importance to the visual aspect of their product displayed in store surroundings. The idea of providing, wardrobe building or styling approach to visual merchandising, was lost, as all the retailers preferred to present their product by brand identity. Retailer B attempts to create "that whole customer experience" by offering a lifestyle product alongside clothing "if we were just a clothes shop, it would be pretty boring". The lifestyle offering consists of books, toys and graffiti art supplies. Although this product adds to the store atmosphere and the overall brand ethos it is not a money-making product. Retailer B also suggests, he prefers to display his clothing by brand so that the customer easily identifies it.

This is in contrast to Retailer C and D, who place importance on their store atmosphere as part of their brand ethos. Retailer C creates a relaxed atmosphere with the use of soft furnishings that helps to create a luxurious feel. Store observation concluded that Retailer C's shop was located in a Georgian townhouse that creates an exclusive, almost old worldly feel to the store. In contrast the ground floor has a bright, modern atmosphere which houses the entry point stock, directed at a wide customer base. The first floor has a more exclusive ambience with high end product displayed to its full potential to attract a higher spending customer who expects one to one customer service. Retailer C prefers to display their product by brand that enables her to capture the look of the brand. However, in contrast she suggests: -

"As an independent I would much rather put money into stock rather than shop fittings".

Retailer D placed significant importance on the visual impact of their newly developed store concept. The creativity of Retailer D is apparent as the interiors of the store and concept were created around the

aesthetic of the product. The walls were lime plastered to capture and create a sense of light and work with the Georgian townhouse the store is set in. An oak cash desk and wooden display units are hand crafted by a local carpenter, allowing the product to be displayed simply and to emphasis its uniqueness and quality. Retailer D, also highlights the importance of supporting local crafts people as a way of introducing another interesting dynamic to their store: -

"Local artists have work displayed around the store, as well as bags and Scottish handmade knitwear, this has provided commissions and other work for the artist, designer, carpenter etc."

Independent fashion retailers are able to establish a defined brand identity through store image, however, in-store displays have to be innovation and unusual. The retailers in this study all take a simple approach to their in-store displays, preferring to create store environment through atmosphere and presenting product to highlight the significance of the brand

Finally, the research identified what each retailer believed to be their individual or unique approach to their business. All the retailers suggested that providing some form of differentiation from their competitors allowed them success in this difficult marketplace. However, they all had differing approaches to what makes their business unique.

As identified previously with over three decades of experience as an independent fashion retailer, Retailer A, simply suggests that what made his company unique was:-

"From my point of view, thinking laterally, creating points of difference to one's competitors be it by service, product, image and local market awareness".

Retailer B believes his uniqueness and individuality comes from product, offering product that customers can't get elsewhere. He believes *"independents offer something that no one else does"*.

Retailers C and D believe staff and customer service is key to differentiating from competitors. Retailer A agrees: -

"I would say this: product is important but three basic things make a successful business: Product/People/Profit. Staff make or break a business"

Through customer service, these retailers are creating a differentiated retail experience, which encourages customers to dwell and consume.

Retailer C suggests the personality behind the store also contributes to the individuality of her business.

Retailer D concludes by suggesting that: -

"Unique product, hand-picked product and customer service that is personal also contribute to what makes independents individuals as well as the aesthetic of the store and the strong brand ethos".

Independent fashion retailers, therefore shape their stores around an attitude or lifestyle; they cater specifically for the unique characteristics of their customer.

4 Conclusion

The literature identifies the difficulties faced by independent retailers, particularly fashion independents in today's marketplace (Tungate 2015). The changing landscape of the high street with the pressure applied by multiple retailers and online retailing has driven independent retailers off the high street to secondary locations (Donnell, Hutchinson & Reid 2012). However, the determination and innovation of independents has led to a sense of optimism and community support. The key findings of the research highlighted that the motivation behind establishing an independent fashion retailer is notably and entrepreneurial spirit and determination. The independent fashion retailer from the beginning wants to establish a business through, which they can apply their own identity. Innovation and creativity are a substantial aspect of this process, whether it is through choice of product or full store environment that creates the individuality and unique store identity (McGregor 2014). Most importantly all of the independent retailers highlighted the need to offer "something different" as a key motivation for establishing their business. Their own personal interests combined with a belief that they can provide a different shopping experience was a key driver to their success and each retailer reflected that they aimed to offer an experience that was not readily available in the marketplace (Ballatine et al 2015).

Porter (1984) generic competitive strategy was applied to the context of fashion independent retail and revealed that both differentiation and focus strategy were fundamental to the concept of the independent. As differentiation strategy suggests a business can gain superior performance by offering a product or service that is distinctive in the marketplace, the business must be offering something unique. Similarly, Porter's focus strategy concentrates on a narrow market, in which the business must understand its market thoroughly and may operate in a niche or specialist marketplace. Each independent retailer applied elements of Porter's generic competitive strategy to their business. All of the retailers presented a form of differentiation, generally through distinctive product offering and customer service. The research indicated that the specialised nature

of each of the fashion independents was expressed through a specific narrow target market chosen by each retailer; the focus is evident in the retailers chosen direct, whether it is street wear, aesthetic and quality of product or exceptional customer service (Stanton and Linneman 2009). A focus strategy was further developed when the retailer applied the chosen concept to their store and brand ethos, creating a whole shopping experience. All of the retailers involved in the research were striving to create a whole retail experience by focusing on one area of the marketplace, which is unlike their surrounding competitors. The key findings of the research also found that the marketing mix was fundamental in the success of the fashion independent retailer (Diamond 2006). Each retailer had an individual approach to the marketing mix and identified with certain elements as a means of developing their business. All the retailers emphasized product as one, if not the most important aspect of their retail business. As fashion retailers they all aimed to offer product that was new innovative and of high quality with some specialised attributes. The product did not need to be high priced; instead it may not have been readily available, was an exclusive item or could not be easily sourced elsewhere, that allowed the retailers to gain competitive advantage in their marketplace. Each retailer also, stressed the importance of seeking out and taking time to select product specific to customer requirements. Additionally, price was not key in the independent retailers business strategy, product was not price driven, instead customers preferred to benefit from the unique or exclusive product on offer.

As documented in the literature, the high street is a fast paced, every changing environment led by the development of digital and ecommerce (Quinn et al 2014). All of the retailers have developed online stores, which they view as an extension of their existing business. All were resolute in that they would continue to have a physical presence on the high street, but acknowledged the importance of building their e-tailing aspect of the business. The physical façade of their store added to the unique aspect of their business, each retailer had a defined concept and store identity, created by the building or interiors. Also, the research revealed that the retailers found being positioned by or near their main competitors to be beneficial to their business. Social media was identified as another area of immediate development, with the research presenting differing responses. As such, a number of retailers viewed social media as an essential element of their business strategy in terms of marketing and promotion.

The research concluded that each retailer had a similar business strategy, in that they were all striving to offer a unique retail experience. However, the retailers each focused on a particular aspect of their business that differentiates them from each other and their competitors. The retailer's particular focus varied from one retailer offering exceptional customer service to another focusing on quality and aesthetic of product. It was apparent that customers identified with the individual focus chosen by each retailer as all the retailers were thriving in an uncertain retail environment. The key findings of the research concluded that the unique characteristics of independent fashion retailers were not only created by focusing on the individual elements of the marketing mix, but also by the owner's own creativity and innovation in creating a unique identity for their business.

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